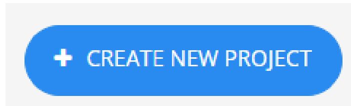
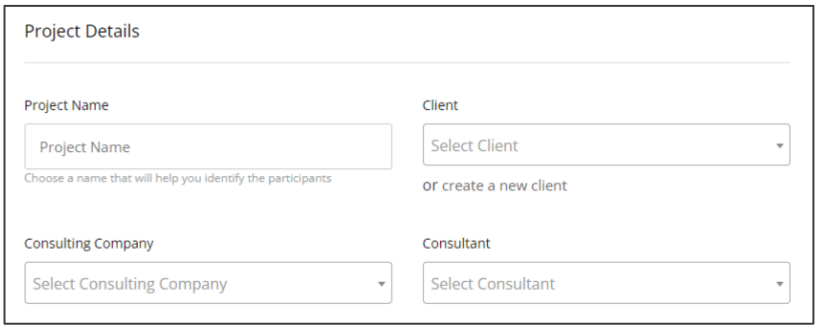
ORDERING A LEADERSHIP CIRCLE PROFILE

Login to the [Project Center](#) with the email you had registered with for Certifications.

On the dashboard, click "CREATE NEW PROJECT"



The fields shown below are described beneath it.



Click in the “Project Name” box and type what you’d like the project to be named. The "Project Name" is basically a file folder name, so something that makes sense to you, as you’ll be the only one who sees it; example: Marketing Dept, May 2021.

Click on the link below the “Client” box which reads, “or create a new client.” Because you are a new practitioner, you won’t have any clients in your account yet.

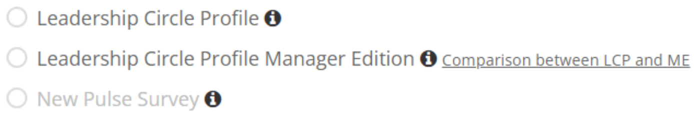
Click back in the “Client” box and type the name of your client’s company. If you’re working with people inside your organization, add your Company Name as the client name.

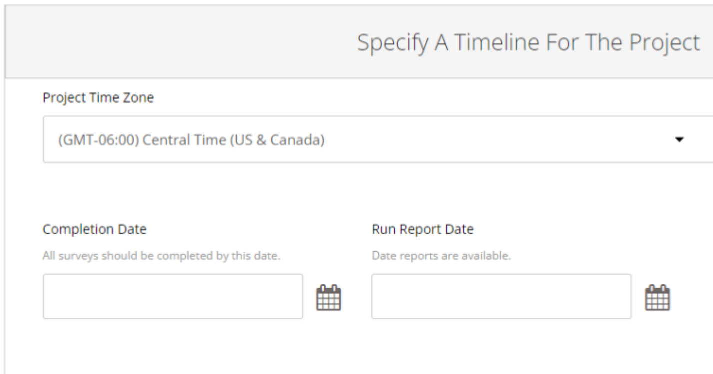
Click the drop-down arrow and select the industry this client best represents

Click in the "Consulting Company" box and start typing your name. When your name appears, click on it to select it. If your personal name doesn’t pop up, try typing the name of your company.

The “Consultant” should auto-fill with your name.

Select the Product you'd like to order and then scroll down to complete the project parameters.





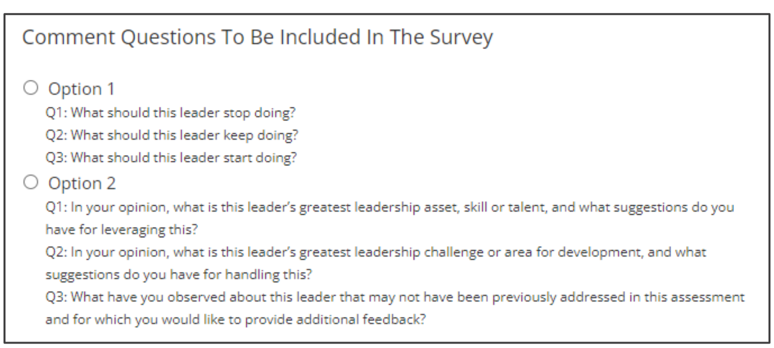
Project Time Zone - It's important to select the correct time zone, and this is the zone where your client (the participant) resides. This date and time appear in the login invitation email, so please select a specific time as well.

Select the "Completion Date" (date and time survey closes) and the "Run Report Date" (date and time the report processes). 3-6 weeks is standard from project start to Completion Date.

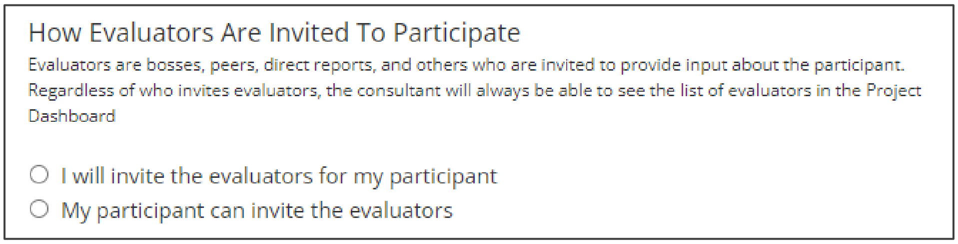
You can skip "Comments for Printer" unless you have something odd like, "tell FedEx to put the package on the porch".

"Schedule Sending of Invitation Email" is where you can tell the system to send the invitation email to your Participant automatically, on a specific date and time. If you prefer to leave this blank, you can send the invitation manually as well, which is what many opt to do.

Choose the option you prefer for the three write-in comment questions at the end of the survey. Recommended to use Option 2 for more in-depth answers.



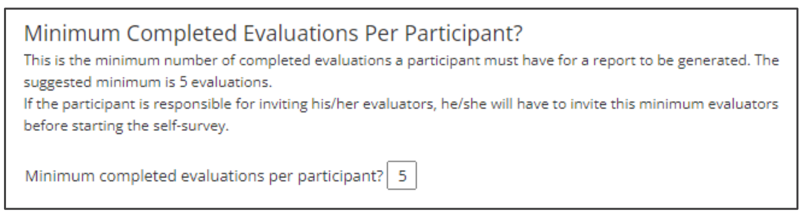
Scroll down to "How Evaluators are Invited to Participate." We recommend you select, "My participant can invite the evaluators," rather than gathering all that info and doing it yourself.


How Evaluators Are Invited To Participate

Evaluators are bosses, peers, direct reports, and others who are invited to provide input about the participant. Regardless of who invites evaluators, the consultant will always be able to see the list of evaluators in the Project Dashboard

- I will invite the evaluators for my participant
- My participant can invite the evaluators

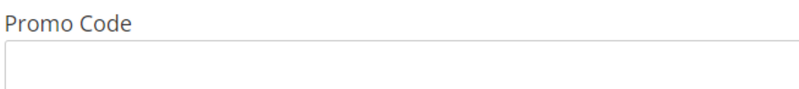
"Minimum Completed Evaluators Per Participant" defaults to 5, because that is the number of evaluators needed for a statistically valid report. We recommend bumping it up to ensure they setup more than 5, hoping that at least 5 complete. It's important to know that whatever number you enter here, the Participant has to setup that number of Evaluators before their self-survey tab becomes active AND the report will not process until that benchmark is reached. We can always edit the project later to a lower number if you don't think the Participant will receive the required number of evaluator surveys you set.


Minimum Completed Evaluations Per Participant?

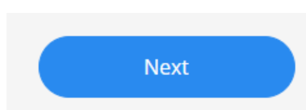
This is the minimum number of completed evaluations a participant must have for a report to be generated. The suggested minimum is 5 evaluations.
If the participant is responsible for inviting his/her evaluators, he/she will have to invite this minimum evaluators before starting the self-survey.

Minimum completed evaluations per participant? 5

The "Promo Code" box is where you will enter a code if you have a free or discounted Profile. Leave it blank if you do not.


Promo Code

Scroll to the bottom and click "Next".



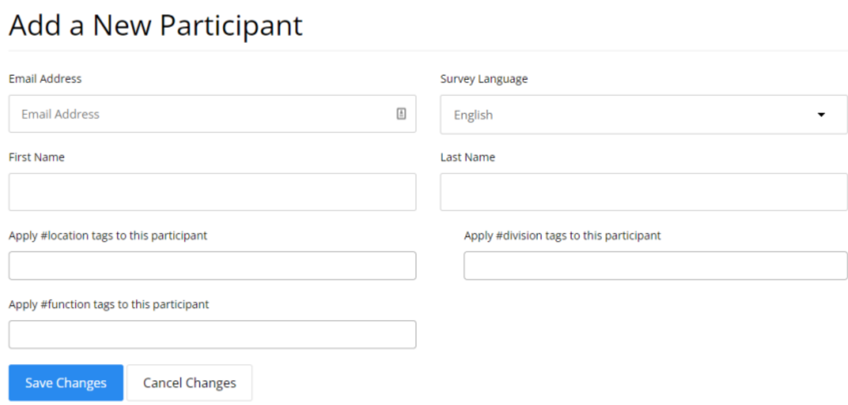
Select the type of report deliverables you want, PDF (e-copy) or PRINTED.

Enter Billing Address Information

Enter Shipping information if you ordered printed materials. There are two separate address entries: one for the report and one for the binder with the interpretation manual. The address should usually be the consultant's address, not the participant's. The reason for this is because the coach will typically share the printed reports with the participant on the day of the session or at the session to prevent the participant from interpreting their results before the debriefing session.

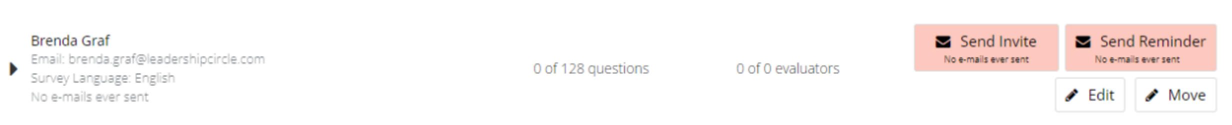
Click “Create Project” to save the Project parameters.

Click “Add Participant” to add your client’s first name, last name, and email address. Then click “Save Changes” to add them to the Project you just created.



After adding your client to the project, you’ll see two pink tabs to the right. One reads, “Send Invite” and the other reads, “Send Reminder.” Prior to clicking “Send Invite,” we recommend that you send an email (or have a conversation with the participant) about the steps, what happens and expectations once their LCP is launched. Please see the sample launch email below.

If you’re ready for your Participant to have the login invitation email with their unique link, click “Send Invite” and the email will instantly be sent to them from notifications@theleadershipcircle.com .



"Launch Email": SAMPLE EMAIL TO SEND TO PARTICIPANT PRIOR TO SENDING LINK FROM PROJECT CENTER:

Hi XXX and welcome to your Leadership Circle Profile process!

This email provides you with the information you will need regarding the steps required to complete your Leadership Circle Profile, and what happens when the survey is complete.

STEP 1: Identify Your Evaluators & Ask Them to Provide Feedback

It is recommended that you identify 10-15 evaluators. Criteria for your evaluators are those people who:

- Know you well and will provide you with honest feedback.
- Have good intentions and sincerely want to help you learn more about yourself.
- Understand your job responsibilities and areas of influence.
- Can describe you in relation to the many roles you play.
- Click here for tips on picking evaluators/raters

You will need **at least 3 Evaluators in each category** to respond in order for each data set to be broken out by category. For example, if you only listed two "Direct Reports," their data would be included in the overall results, but not reported as a separate category, in order to protect their anonymity. The exception to this anonymity rule is your **Boss** or **Boss's Boss,** for whom data is not grouped with any other data and is directly attributable to that individual. The "**Other**" category is a good place for either a variety of individuals who do not fit easily into the other categories or a particular constituency (stakeholders, customers, reports of direct reports, etc.).

Evaluator Categories:

- **Boss's Boss:** Optional. May enter one or more. Only one completed survey is needed to view breakout data on the report.
- **Boss:** This is the person who gives you your performance appraisal. May enter more than one. Only one completed survey is needed to view breakout data on the report.
- **Peer:** These are people who know your work as a leader, but don't report to you or have input into your evaluation. Three or more completed surveys are needed to view breakout data on the report.
- **Direct Report:** These are people with whom you have input into their performance evaluations. Three or more completed surveys are needed to view breakout data on the report.

- **Other:** These may be vendors, customers, partners, or people with whom you've worked on volunteer projects. Three or more completed surveys are needed to view breakout data on the report.

IMPORTANT PRE-SURVEY STEP: Be sure to contact the individuals you are requesting feedback from ahead of time by email or phone prior to setting them up in the system. A sample email for you to customize and send to your evaluators is attached. If you choose not to send a pre-survey email, it is important you inform your evaluators they will be receiving an email containing the survey link from notifications@theleadershipcircle.com.

STEP 2: Receive Your Login Information & Enter Your Evaluators

Shortly, you'll receive an email asking you to log in and create a password to access the survey. The email arrives from notifications@theleadershipcircle.com. If the email doesn't appear in your inbox, please check your SPAM/JUNK folder.

- Click on the link within the email to access the survey login page.
- Click "Forgot/Create Password" to create a password.
- Log in to the survey using your new password and email address.
- Log in to enter your evaluators, click "Evaluator Setup*," and follow the prompts to add your evaluators and their email addresses. (Be sure to double-check the email address for each evaluator to ensure accuracy.) The system will send each of your evaluators a login email so they can complete your feedback.

  *Please complete this step as soon as possible, to allow your rates ample time to complete.

STEP 3: Complete the Self-Survey

After entering your evaluators, you will have access to your Self Survey, which will take approximately 20 minutes to complete. Click on the button to begin. The answers save after each question, so you can log in and out of the survey, without losing data. This data will be used to evaluate your perception of self and compare it to the perception held by your evaluators.

We'll target completing the assessment (you and your evaluators) by **INSERT DATE,** so it's important to get started as soon as possible. Please set up your evaluators as soon as you can, to allow them adequate time to complete your assessment.

STEP 4: Debrief Session with Your Coach

As the survey close date approaches, you will be contacted to set up a time to review your assessment data and discuss its meaning and value for improving your effectiveness as a leader and team member. You'll receive a detailed personal profile with guidelines to interpret the results.

<u>SAMPLE EMAIL TO EVALUATORS</u> (Referred to at the end of Step One of the Launch Email -- Usually sent as an attachment to the Launch Email)

PLEASE CUSTOMIZE AND SEND TO EACH OF YOUR EVALUATORS BEFORE SETTING THEM UP IN THE SURVEY SYSTEM.

Dear **<Insert name of evaluator>:**

I am currently engaged in a process of gathering feedback regarding my leadership effectiveness and development opportunities. I am using the Leadership Circle Profile 360° assessment to gain a deeper perspective on my leadership and help me to take my effectiveness to a higher level.

I am asking you to participate because I feel you know me well and I know that you will give me honest feedback. Your responses are anonymous and confidential. If you're willing, this will involve you completing an online survey to assess my leadership effectiveness.

In the next few days, you will receive an email from notifications@theleadershipcircle.com. The email will provide you with a link to log in and to create a password, necessary to complete the assessment. Completing the assessment will take approximately 20 minutes of your time. The deadline* for completing the survey is **[insert date].**

I sincerely thank you for your willingness to participate and to contribute to my development as a leader.

Thank you,

<Insert your name>